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CITRUS

MARCH FORECAST MATURITY TEST RESULTS AND FRUIT SIZE



FLORIDA
AGRICULTURE

March 10, 2004

ALL ORANGES STAY AT 246.0 MILLION BOXES

The Florida forecast of all oranges for recorded utilization, released today by the National Agricultural Statistics Service (NASS), Agricultural Statistics Board, of the USDA, is continued at 246.0 million boxes. Early and midseason oranges (including Navels) decreased to 127.0 million and late type (Valencia) oranges increased to 119.0 million boxes. If realized, this forecast will be the largest on record, one percent above the previous production record of 244.0 million boxes in 1997-1998, and 21 percent above last season. In the previous 10 seasons, March forecasts of all oranges have differed from the final recorded utilization by an average of 1.5 percent, with four seasons above the final, and six below.

The weather conditions for Florida citrus in February were generally beneficial to the current crop. Temperatures have been moderately cool, with no freezes, and rainfall in most areas has been sufficient.

EARLY-MIDSEASONS REDUCED TO 127.0 MILLION BOXES

The forecast of the early and midseason oranges (including Navels) is lowered to 127.0 million boxes. Certified utilizations through March 7, as reported by the Citrus Administrative Committee, total 123.1 million boxes. An allowance for non-certified gift fruit raises the total of harvested fruit within 2.0 million boxes of this month's forecast. The row count survey conducted on March 1-2 indicated that 95 percent of the rows have been harvested. Weekly harvesting is decreasing

**CITRUS PRODUCTION, MARCH 1, 2004
FORECASTS BY VARIETIES AND STATES, WITH COMPARISONS**

| Crop and State | Production | | Forecast | |
|--------------------------------------|----------------|----------------|----------------|----------------|
| | 2001-02 | 2002-03 | Feb 10, 2004 | Mar 10, 2004 |
| --- 1,000 boxes --- | | | | |
| Early, Midseason, and Navel Oranges: | | | | |
| FLORIDA | 128,000 | 112,000 | 128,000 | 127,000 |
| California | 32,000 | 41,000 | 39,000 | 39,000 |
| Texas | 1,530 | 1,350 | 1,300 | 1,300 |
| Arizona | 270 | 200 | 220 | 220 |
| Total Above Varieties | 161,800 | 154,550 | 168,520 | 167,520 |
| Valencias: | | | | |
| FLORIDA | 102,000 | 91,000 | 118,000 | 119,000 |
| California | 19,500 | 21,000 | 19,000 | 15,000 |
| Texas | 210 | 220 | 230 | 230 |
| Arizona | 250 | 270 | 250 | 250 |
| Total Valencias | 121,960 | 112,490 | 137,480 | 134,480 |
| All Oranges: | | | | |
| FLORIDA | 230,000 | 203,000 | 246,000 | 246,000 |
| California | 51,500 | 62,000 | 58,000 | 54,000 |
| Texas | 1,740 | 1,570 | 1,530 | 1,530 |
| Arizona | 520 | 470 | 470 | 470 |
| Total All Oranges | 283,760 | 267,040 | 306,000 | 302,000 |

FORECAST DATES 2003-04 SEASON

| | |
|---------------|---------------|
| April 8, 2004 | May 12, 2004 |
| June 11, 2004 | July 12, 2004 |

as processing plants switch to Valencia oranges.

VALENCIAS RAISED TO 119.0 MILLION BOXES

The late type (Valencia) orange forecast is increased to 119.0 million boxes. The fruit size remains above average, with fruit continuing to grow as projected. The average fruit loss from droppage on sample trees is a record low for the second consecutive month. These two factors together indicate an increase in the forecast. The row count survey, with less than four percent harvested, is not a factor in the decision to change the forecast.

SURVEY COMPONENTS USED IN THE FORECAST ^{1/}

| Type | Bearing trees | Fruit per tree | Percent droppage | Fruit per box |
|-----------|---------------|----------------|------------------|---------------|
| (1,000) | | | | |
| Early-Mid | 32,161 | 1,236 | 10.9 | 245 |
| Navel | 2,158 | 379 | 9.1 | 129 |
| Valencia | 41,572 | 684 | 11.3 | 197 |

^{1/} November survey data is considered final for Navels, December for early-mids, and March for Valencias.

FCOJ YIELD 1.53 GALLONS PER BOX

The projection of yield of FCOJ for all oranges is unchanged at 1.53 gallons per box at 42.0 degrees Brix. There is, however, a shift in the yield by types. The early-midseason portion is now projected to yield 1.45 gallons per box, down from 1.47 last month. The Valencia portion is now projected to yield 1.62 gallons per box, up from 1.60 gallons.

The early-mid harvest is almost complete with increasing amounts of Valencias being delivered to processing plants. Results of maturity testing of Valencias remaining for harvest is reported on page 3.

GRAPEFRUIT 40.0 MILLION BOXES

The grapefruit forecast for certified utilization (including an allocation of 1.5 million boxes of gift fruit and local sales) is maintained at 40.0 million boxes, unchanged since January. The forecast consists of 16.0 million boxes of white grapefruit and 24.0 million boxes of colored grapefruit. If realized, the total grapefruit crop will be three percent more than the 38.7 million boxes harvested last season.

The primary indicator used this month is the row count survey conducted on March 1-2. **White** grapefruit had 60 percent rows harvested while **colored** grapefruit had 54 percent rows harvested. The harvest percentage for whites is much higher than recent seasons and similar to that of 1994-95 and 1995-96. The colored variety this year is near the average of the last ten years. The number of rows harvested versus the amount of fruit harvested did not suggest a change in the forecast.

Fruit size measurements obtained in February show growth consistent with the previous months, fully supporting the forecast numbers for both white and colored grapefruit. The drop rate for white grapefruit is slightly higher than expected, however, not significantly enough to make a change in the forecast. Droppage of colored grapefruit continues as expected.

CITRUS PRODUCTION, MARCH 1, 2004
FORECASTS BY VARIETIES AND STATES, WITH COMPARISONS

| Crop and State | Production | | Forecast | |
|----------------------------|---------------|---------------|---------------|---------------|
| | 2001-02 | 2002-03 | Feb 10, 2004 | Mar 10, 2004 |
| --- 1,000 boxes --- | | | | |
| Grapefruit: | | | | |
| FLORIDA-All | 46,700 | 38,700 | 40,000 | 40,000 |
| White ^{1/} | 18,900 | 16,200 | 16,000 | 16,000 |
| Colored | 27,800 | 22,500 | 24,000 | 24,000 |
| Texas | 5,900 | 5,650 | 5,200 | 5,200 |
| Arizona | 160 | 130 | 100 | 100 |
| California | 5,900 | 5,600 | 5,300 | 5,300 |
| Total Grapefruit | 58,660 | 50,080 | 50,600 | 50,600 |
| Lemons: | | | | |
| California | 18,300 | 24,000 | 23,000 | 23,000 |
| Arizona | 2,800 | 3,000 | 3,200 | 3,200 |
| Total Lemons | 21,100 | 27,000 | 26,200 | 26,200 |
| Limes: Florida | 150 | ^{2/} | ^{2/} | ^{2/} |
| Temples: Florida | 1,550 | 1,300 | 1,400 | 1,400 |
| Tangelos: Florida | 2,150 | 2,350 | 1,300 | 1,000 |
| K-Early: Florida | 30 | ^{2/} | ^{2/} | ^{2/} |
| Tangerines: | | | | |
| FLORIDA-All | 6,600 | 5,500 | 5,900 | 5,900 |
| Early ^{3/} | 4,350 | 3,000 | 3,600 | 3,600 |
| Honey | 2,250 | 2,500 | 2,300 | 2,300 |
| California ^{4/} | 2,200 | 2,500 | 2,500 | 2,500 |
| Arizona ^{4/} | 620 | 430 | 600 | 600 |
| Total Tangerines | 9,420 | 8,430 | 9,000 | 9,000 |

^{1/} Includes seedy.

^{2/} No forecast.

^{3/} 2001-02 -- Robinson, Fallglo, Sunburst, and Dancy; 2002-03 production and 2003-04 forecast -- Fallglo and Sunburst only.

^{4/} Includes tangelos.

Estimated utilization for all grapefruit to the first of March is 23.3 million boxes, with 7.6 million boxes of whites and 15.7 million boxes of colored varieties. Exports continue to keep many grapefruit houses running, as the domestic market lags behind in demand. Harvest of field run fruit for processing is increasing.

SURVEY COMPONENTS USED IN THE FORECAST^{1/}

| Type | Bearing trees | Fruit per tree | Percent droppage | Fruit per box |
|--------------------------------|---------------|----------------|------------------|---------------|
| (1,000) | | | | |
| White Grapefruit ^{2/} | 3,333 | 497 | 11.4 | 91 |
| Colored Grapefruit | 5,461 | 503 | 12.4 | 101 |

^{1/} January survey data is considered final.

^{2/} Seedless variety only.

TANGERINES STAY AT 5.9 MILLION BOXES

The forecast of all tangerines remains unchanged at 5.9 million boxes. Harvesting of early season tangerines (Fallglo and Sunburst) is relatively complete. Final utilization of **early** tangerines at 3.6 million boxes is 600,000 boxes (20 percent) more than last season's total.

Later maturing **Honey** tangerines remain forecast at 2.3 million boxes. The row count survey showed only 39 percent of the rows harvested. In the past ten seasons, the harvest percentage on March 1 was lower only in the 1999-00 season.

The monthly size and drop surveys show sizes slightly larger than the previous ten season average and the droppage rate below average. These components fully support the current forecast level. Estimated utilization to the first of the month is over 1.3 million boxes, near the same as last season to the same date.

TEMPLES CONTINUE AT 1.4 MILLION BOXES

The forecast of Temples remains at 1.4 million boxes again this month. The monthly row count survey indicates that 54 percent of the rows have been harvested to date. Fruit sizes remain the same while drop percentages have increased only slightly. If realized, this crop will be 100,000 boxes more than last year's final production. Estimated utilization to March 1 is 850,000 boxes.

TANGELOS NOW 1.0 MILLION BOXES

The tangelo forecast is lowered to 1.0 million boxes. Harvest is complete with an estimated 975,000 boxes utilized to March 1. The combination of very low fruit per tree (making it expensive to harvest) and the lack of demand for fruit for processing cut short the harvest of the remaining crops. The row count survey indicates about 35 percent of the rows did not get harvested.

UNADJUSTED MATURITY TESTS: Average of regular bloom fruit from sample groves, 2002-03 and 2003-04 seasons

| Fruit type (No. groves) test date | Acid | | Solids (Brix) | | Ratio | | Unfinished juice per box | | Solids per box | |
|---|----------------|---------|------------------|---------|---------|---------|-----------------------------|---------|-------------------|---------|
| | 2002-03 | 2003-04 | 2002-03 | 2003-04 | 2002-03 | 2003-04 | 2002-03 | 2003-04 | 2002-03 | 2003-04 |
| | <i>Percent</i> | | <i>Percent</i> | | | | <i>Pounds</i> | | <i>Pounds</i> | |

Juice and solids per box are unadjusted and not comparable to plant test results.

ORANGES:

Late (142-149)

| | | | | | | | | | | |
|-------|------|------|-------|-------|-------|-------|-------|-------|------|------|
| Oct 1 | 2.05 | 2.01 | 8.69 | 8.92 | 4.32 | 4.48 | 48.92 | 46.28 | 4.25 | 4.13 |
| Nov 1 | 1.65 | 1.64 | 9.22 | 9.56 | 5.68 | 5.90 | 52.39 | 51.05 | 4.83 | 4.88 |
| Dec 1 | 1.43 | 1.40 | 10.05 | 10.39 | 7.14 | 7.53 | 53.23 | 53.44 | 5.35 | 5.55 |
| Jan 1 | 1.24 | 1.26 | 10.85 | 11.13 | 8.84 | 8.94 | 54.27 | 53.38 | 5.89 | 5.94 |
| Feb 1 | 1.20 | 1.18 | 11.48 | 11.87 | 9.69 | 10.12 | 54.54 | 52.01 | 6.26 | 6.18 |
| Mar 1 | 1.08 | 1.06 | 12.24 | 12.66 | 11.52 | 12.01 | 53.22 | 52.53 | 6.51 | 6.65 |

NOTICE: All samples were run through an FMC 091 machine using mechanical pressure only. This machine utilizes a .040 short strainer and standard 5/8-inch orifice tube. The beam settings are also identical to past tests and nor restrictions are used.

MATURITY TEST AVERAGES BY AREAS, MARCH 1, 2004

| Fruit type | Groves sampled | Acid | Solids (Brix) | Ratio | Unfinished juice per box | Solids per box |
|------------|-------------------|----------------|------------------|-------|-----------------------------|-------------------|
| | <i>Number</i> | <i>Percent</i> | <i>Percent</i> | | <i>Pounds</i> | <i>Pounds</i> |

ORANGES:

Late

| | | | | | | |
|--------------------|-----|------|-------|-------|-------|------|
| Indian River Dist. | 26 | 1.05 | 12.90 | 12.35 | 53.25 | 6.87 |
| Other Areas | 123 | 1.07 | 12.61 | 11.94 | 52.38 | 6.61 |

FRUIT SIZE COMPARISONS BY TYPES TO PREVIOUS SEASONS

Size frequency distributions from the February size survey are shown in the table below. The distributions are by percent of fruit falling within the size range of each 4/5-bushel container. Fruit sizes were measured on trees in sample groves during the period February 18 through 27, 2004. Comparable sizes for 2002 and 2003 are also shown. These measurements are of fruit from spring bloom and exclude summer bloom in all seasons.

The chart below compares the relationship of the February 2004 Valencia orange fruit size measurements with those taken in February 2003. The diameter measurements shown are the minimum values of each eighth inch range except for the smallest value.

FLORIDA CITRUS: Size frequency distributions from February measurements

| Type of fruit and size in 4/5-bushel containers | 2002 | 2003 | 2004 |
|--|------------------------|------|------|
| | <i>--- Percent ---</i> | | |
| Valencia oranges: | | | |
| 64 and larger | 6.9 | 14.7 | 11.2 |
| 80 | 23.7 | 33.9 | 29.8 |
| 100 | 37.8 | 36.4 | 38.4 |
| 125 | 23.0 | 12.7 | 16.8 |
| 163 and smaller | 8.6 | 2.3 | 3.8 |
| White seedless grapefruit: | | | |
| 32 and larger | 16.2 | 34.9 | 26.7 |
| 36 | 18.7 | 24.7 | 21.0 |
| 40 | 21.9 | 17.6 | 20.3 |
| 48 | 20.5 | 11.4 | 13.2 |
| 56 | 10.9 | 5.2 | 7.1 |
| 63 and smaller | 11.8 | 6.2 | 11.7 |
| Colored seedless grapefruit: | | | |
| 32 and larger | 7.9 | 25.0 | 12.1 |
| 36 | 14.9 | 22.8 | 20.2 |
| 40 | 21.5 | 20.5 | 25.3 |
| 48 | 21.7 | 14.6 | 17.1 |
| 56 | 13.3 | 7.7 | 10.3 |
| 63 and smaller | 20.7 | 9.4 | 15.0 |

CHART 1: Valencia orange size frequency by diameter from February measurements.

